

[Your Name]
[Your Address]
[City, State, Zip Code]
[Your Phone Number]
[Your Email Address]

[Date]

[Financial Institution Name]
[Account Department]
[Institution Address]
[City, State, Zip Code]

Subject: Request to Open a Minor Custodial Investment Account (UTMA/UGMA)

Dear Account Services Manager,

I am writing to formally request the opening of a minor custodial investment account under the [Uniform Transfers to Minors Act (UTMA) / Uniform Gifts to Minors Act (UGMA)] for the benefit of the minor named below.

Minor's Information:

Full Name: [Minor's Full Name]
Date of Birth: [MM/DD/YYYY]
Social Security Number: [Minor's SSN]

Custodian Information:

Full Name: [Your Full Name]
Relationship to Minor: [e.g., Parent/Guardian]
Social Security Number: [Your SSN]

I have enclosed the required identification documents for both myself and the minor, including copies of [mention documents, e.g., Birth Certificate, Social Security Card, and Driver's License].

Please let me know if there are additional forms to sign or if further information is required to finalize the account setup. I look forward to receiving the account details and instructions for the initial deposit.

Thank you for your assistance.

Sincerely,

[Your Signature]

[Your Printed Name]